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ABSTRACT

This paper outlines a model for a management team that can be used in a school district. The topics covered include the relationship between the management team and the school board, the selection of team members, and the team's primary functions. A description of a model currently in operation is included. (Author/LD)

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OPERATIONS NOTEBOOK 26

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THE MANAGEMENT TEAM AND YOU

Guideposts To Survival

by
The Management Team
Rio Linda School District

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The Management Team

Introduction

Long before passage of the Rodda Act ACSA has supported and worked for the concept of the Leadership Team – those management and supervisory personnel which are the key agents of the district. It was imperative then that they work together – it is even more crucial now and in the future.

Since the advent of the Rodda Act, ACSA has been aware that significant changes would occur in the relationships of the employees in every school district in California. In most school districts the employees, exclusive of management and confidential employees, have opted to form a collective bargaining unit which has markedly changed the relationships between the employer and the majority of the district employees. Now there exists much confrontation in the negotiating process resulting in the ultimate agreement of an employee union contract which spells out the working conditions applicable to all of the employees in the unit and the subsequent clarification of the agreement.

It is the management team that must work together and be mutually supportive, administer the contract, operate and provide leadership to the school district.

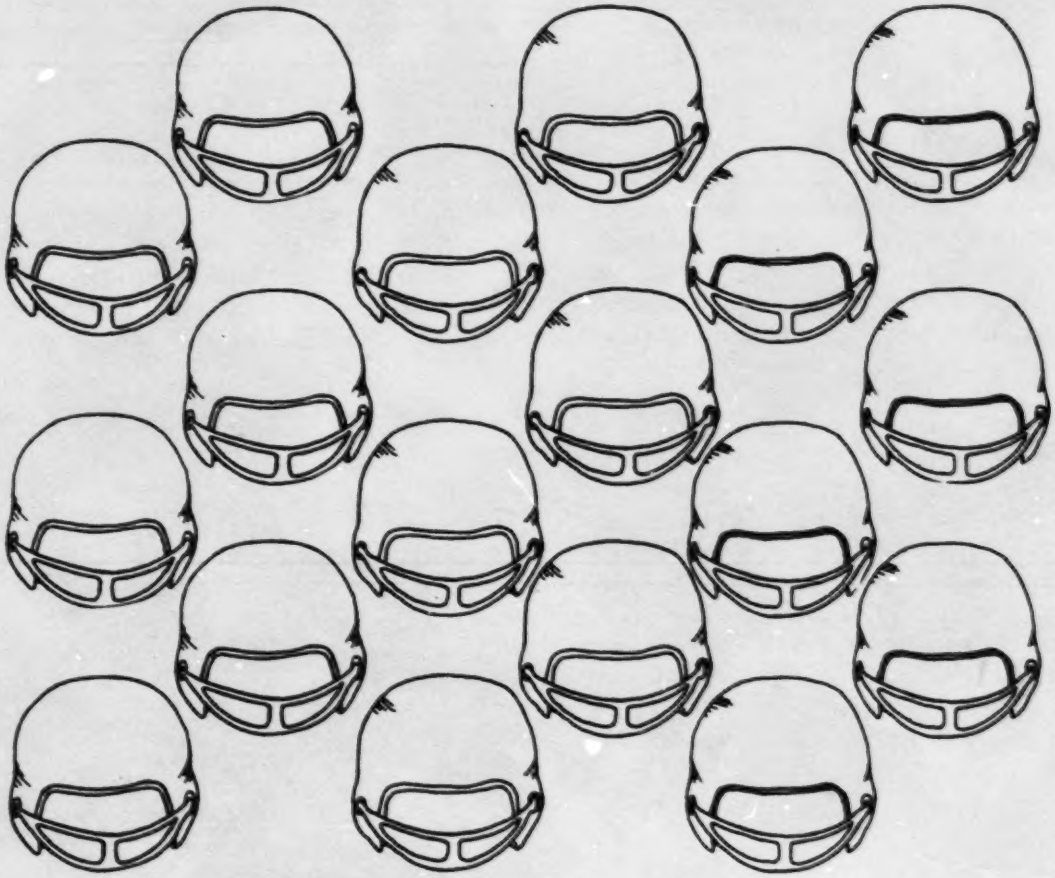
There is no one form of organization or operation of a management team that best meets the needs and conditions of all school districts. This Operation Notebook is but one example. Examine it and the concepts which are outlined and then modify or adopt them to fit your needs.

Sincere appreciation is extended to the many people who contributed to the development of this material and for granting ACSA permission to reproduce it.

Ron Stewart
ACSA President
1979-80

THE MANAGEMENT TEAM AND YOU

Guideposts To Survival

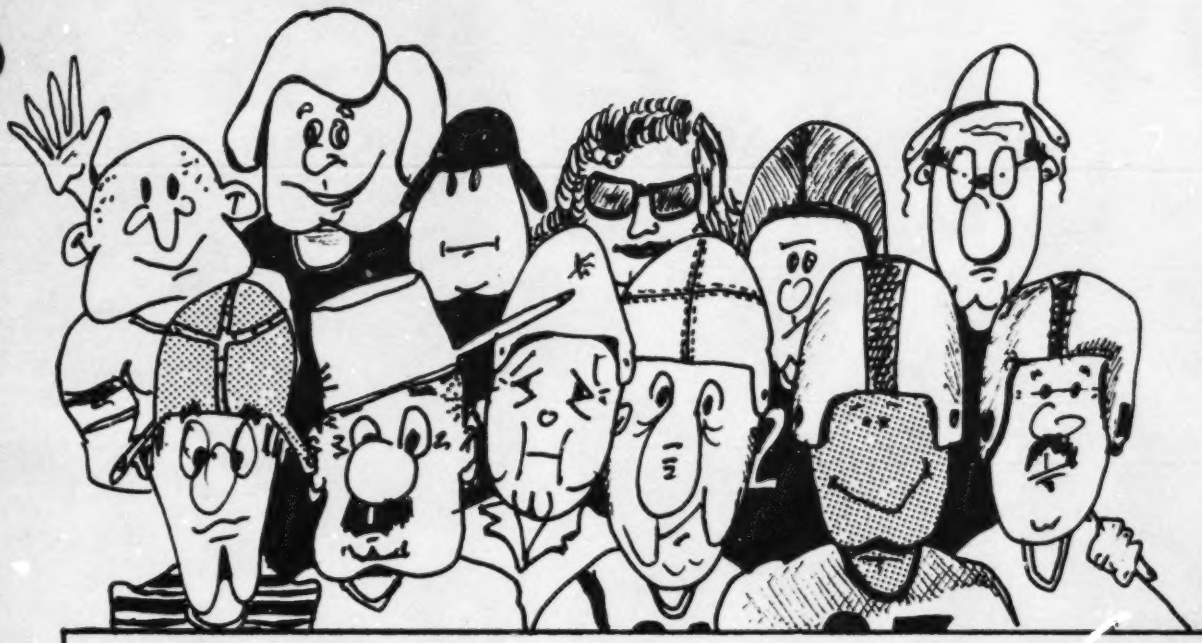


PREPARED FOR THE ACSA REGION III AND

SACRAMENTO COUNTY SCHOOL BOARDS

ASSOCIATION MANAGEMENT TEAM SEMINAR

BY THE RIO LINDA UNION SCHOOL DISTRICT



The Management Team And You

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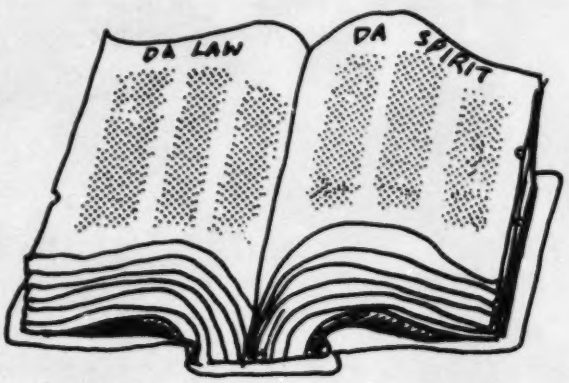
THE MANAGEMENT TEAM....

LEGAL AND ATTITUDINAL DEFINITIONS

Each school district in the establishment of the Management Team must consider both legal and attitudinal definitions. The legal definition of a "'management employee' means any employee in a position having significant responsibilities for formulating district policies or administering district programs. Management positions shall be designated by the public school employer subject to review by the Educational Employment Relations Board."



By law, "no person serving in a management position or a confidential position shall be represented by an exclusive representative. Any person serving in such a position shall have the right to represent himself individually or by an employee organization whose membership is composed entirely of employees designated as holding such position, in his employment relationship with the public school employee, but, in no case, shall such an organization meet and negotiate with the public school employer. No representative shall be permitted by a public school employer to meet and negotiate on any benefit or compensation paid to persons serving in a management position or a confidential position."

The attitudinal definition might be considered and worded in many different ways. Basically, however, the concept that needs to be conveyed would be something like the following:

> A group of individuals identified by the Board of Trustees to assure the highest quality educational program to the pupils of the school district while maintaining the financial integrity of the school district.

If the school board practices the intent of such a definition, management personnel would truly become extensions of the Board of Trustees. It is absolutely essential, therefore, that the Board of Trustees (1) understand the management team concept; (2) participate fully in the development of district policies; and (3) allow management personnel to participate in shared decision-making to the fullest extent. The failure to operate within such an attitudinal framework is very likely to result in a mediocre school district.

IN THE DRIVER'S SEAT...

SCHOOL BOARDS AND THE MANAGEMENT TEAM

Today's school boards find themselves in the middle. They are caught between the public, staff, students, legislators and special interest groups. They are called on to make hard choices and firm decisions concerning moral and fiscal dilemmas which will have a monumental impact on school districts in the future. At the same time it seems that the most suspect people in the educational picture are administrators, yet the board depends on this group to carry out its directions. The question becomes: do the critics expect to operate school districts without management (or do they expect the board to assume those duties)? Neither of the choices is acceptable. A management team process is the only way to achieve success in any field where decisions affect a great many people.

Interestingly, the board's relationship to management or administration is not as complex as many aspects of its duties. As the policy maker and evaluator, the board is often faced with gray areas in its dealings. However, the board's relationship to management is clear cut. Management is the bond between the board and the teaching staff as well as an important link to their electorate. Only when management feels a loyalty to carry out the direction of the board (which hopefully is the public's directive, too) can the district successfully survive.

There are many aspects to attaining this loyalty--but certainly encouragement and support have to be uppermost.

Allowing management input into the decision and policy making process is a large factor.

Particularly with collective bargaining the management team becomes <u>the</u> key to successful negotiations and is just as important in administering the contract once agreed upon. The board's duty is to see that all levels of management are familiar with the principles of collective bargaining, and that they are involved and informed in the

steps that lead to a contract. Public school administrators are in a unique position. Although unrepresented, they are essential to the process. Representation at decision making negotiating sessions is important initially as well as in administering the package. The principal, more than anyone, has to be educated, informed and supportive. Knowledge of the contract may be more important than his educational knowledge.

Since management does not have bargaining units, it is critical that the board see to it that management is "taken care of." In private business those who fail to do so go out of business. In education, the result is chaos. There are many ways to meet management's needs. In these times money isn't the answer, but personal and professional satisfaction is. Most good educational managers could make higher salaries elsewhere if money was their goal. Motivation to accomplish an important job, (i.e., job satisfaction) is of paramount importance.

It is also important that the managers know what is expected of them - starting with an explicit job description. Since they are educators, they must know the other requirements. It's not adequate to say that

they ought to know what to do. The next step is education--knowledge of the fiscal situation is paramount to an understanding of collective bargaining as well as the district operations. Don't wait for them to come to you--seek them out--offer or insist on training and involvement. Meet their needs; they'll meet yours. Do not undermine them or criticize them publicly--they represent you.

The team is as strong as its weakest link (hopefully the board won't be that weak link). We all feel that strength with an involved, informed and educated staff. We are going through a social revolution and management's duties have enlarged enormously in recent years. If we share the burden of those increases, we may yet survive. Particularly if we continuously bear in mind that administrators are people first--with the same human needs as people everywhere.

THE DILEMMA.....

WHO WILL BE ON THE MANAGEMENT TEAM?

There are many options open to a district as it formulates its Management Team. Decisions as to who shall be a member of the Management Team are critically important. Yet there has been wide variation statewide in the exercise of those decisions.

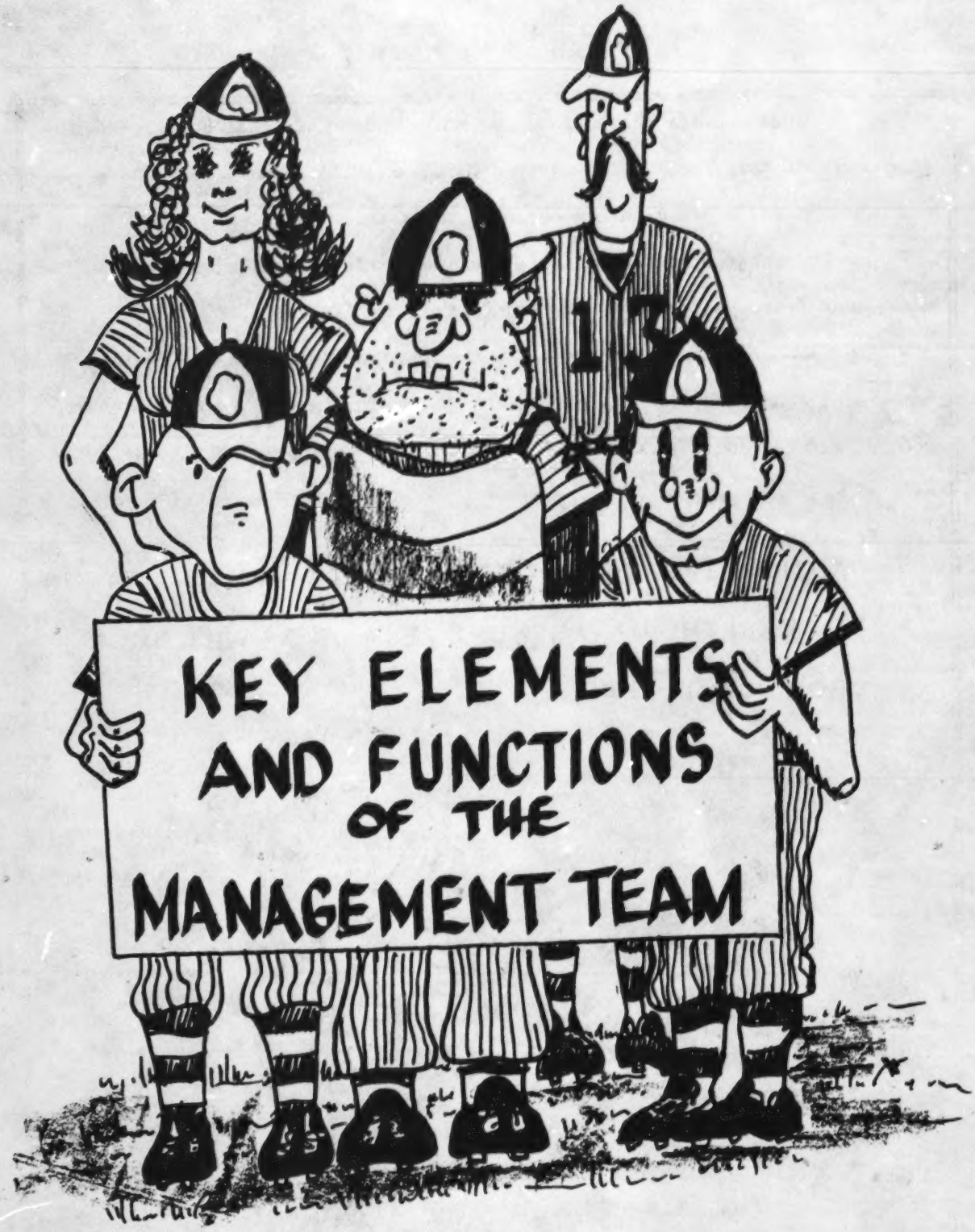
Some districts, particularly smaller ones, have chosen to place only the superintendent and central office staff on the team. Obviously, this decision is a monumental one, because it precludes the participation of the largest management force--school principals.

Psychologists are included on many Management Teams but excluded from many others. The same is true, although with less variation, for coordinators and other middle management positions.

Classified management is frequently excluded from membership on the Management Team, particularly the middle and lower levels.

As a district struggles with the question of membership on the Management Team, it is cautioned neither to preclude nor to grant membership without careful consideration of the rationale for doing so. Everyone must have a bona fide reason for being on the Management Team or he will soon dropout of sight.

CAUTION: EVERYONE MUST HAVE A BONA FIDE REASON TO BE ON THE MANAGEMENT TEAM OR HE WILL SOON DROP OUT OF SIGHT.


KEY ELEMENTS
AND FUNCTIONS
OF THE
MANAGEMENT TEAM

PROBLEM DEFINITION

As a member of the Management Team, each individual should have an opportunity to define problems from his/her perspective. Unidentified problems, like smoldering ashes, have a destructive potential which increases with time. Problem identification must precede intervention, and the combined perspectives of Management Team members provide a viable means to this end.

EVERYONE HAS A VOICE

The Management Team process allows each individual to be involved in the resolution of problems affecting his/her professional role. Working cooperatively, rather than competitively, the team process encourages its members to contribute their talents and ideas for the benefit of a common goal: The highest quality educational program for all children.

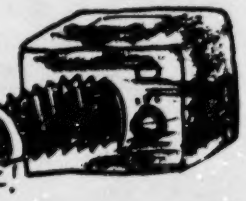
IS IT ALWAYS RIGHT TO BE RIGHT?

Management Team members realize that mistakes are the inevitable result of action. Individuals are aware that not everyone will like what they do because not everyone likes the same things. The Management Team process recognizes that to be human is to be imperfect and members strive to provide an atmosphere in which the constructive elements of criticism can be appreciated and utilized.

DEVELOPING MUTUAL RESPECT

Members of the Management Team must respect one another and realize that action involves risk taking and error. In an atmosphere of trust and mutual respect, isolation is minimized and the development of confidence is enhanced. If a support system is defined as: At least one other person who believes what you are doing is worthwhile, then the Management Team's value in this regard is readily apparent.

THE BIG PICTURE



With a greater awareness of, and appreciation for, the unique contributions of their colleagues, Management Team members can better understand and evaluate decisions affecting the quality of the district's educational program. Many easy decisions and obvious choices are based on ignorance and misunderstanding, and the Management Team process strives to involve, inform and educate each of its members in all aspects of the district's operation.

Constant COMMUNICATION

A decided strength of the Management Team process is the commitment that nothing is kept from the management staff. A constant flow of communication is maintained about negotiation progress, personnel issues, budget preparation, fiscal problems, community dynamics and any and all information that affects the management of the district. This requires constant effort on the part of the cabinet, but is absolutely vital to the integrity of the Management Team concept and pays handsome dividends in staff unity and clarity of purpose. The divisive question, "Where the hell did that decision come from?" can be effectively minimized by adherence to this communication flow.

INSERVICE

The Management Team is an effective arena for meeting the inservice needs of management staff. Through direct instructional techniques and "on the job" types of experiences, the management staff can continue to upgrade professional skills by tapping its own resources.

Through needs assessments and staff surveys, the training needs of the Management Team can be accurately determined. If the management staff is sufficiently large, the majority of the training can be effectively accomplished by district staff members. A representative committee can accomplish the tasks of determining needs, planning training activities and evaluating the efficacy of the training.

Planning and carrying out its own staff development leads the Management Team to a feeling of being self-sufficient and "in charge".

LATERAL ROLE

Improved communications and professional relations result from lateral role experiences. The experience of walking in the other person's shoes builds stronger staff and teacher-administrator relations and increased credibility.

Lateral role experiences should be made available for all members of the Management Team, including the superintendent and central staff. This is a powerful yet reasonably simple way to build team unity and understanding.

INVOLVEMENT= TIME, ENERGY, INTEREST

Probably the most common complaint voiced by educators today is that "there just isn't enough time to do everything that has to be done." Involvement requires time, energy and interest and the absence of any of these variables limits one's effectiveness as as a team member.

In order to maintain rapport and credibility with teachers, however, team members must have the time to provide visible services in their assigned schools. Any loss of credibility experienced by team members can have a generalized negative effect on how other members of the Management Team are perceived. The Management Team must provide each of its members with the time necessary to accomplish a meaningful role in the school. If this is not recognized and provided for, negative consequences are likely to occur.

DELEGATION OF AUTHORITY AND SHARED DECISION-MAKING

The delegation of authority is of paramount importance in the building of a successful Management Team. The Management Team member who fails to delegate authority for decision making to the next level breaks the chain of integrity inherent in the system. Staff

development dealing with decision making processes, problem solving, and group dynamics at all levels will minimize the instances of failure. Variations of the Management Team process can be successfully utilized at the school site level. Shared decision making allows the site manager/principal to more effectively utilize the unique talents of his staff and it provides staff members with opportunities for professional growth and advancement.

AND MORE COMMUNICATION

Communication, frequent, complete and meaningful, is certainly a key element in the central administration of a school district. Even the most autocratic leader can maintain a modicum of support by his constituents if he communicates frequently and well. In the Management Team concept the superintendent is the wellspring of communication. If he ceases to communicate or adversely alters the quality or frequency of communication, the efficacy of the process would inevitably suffer.

The withholding of information is not simply a roadblock to effective management, it is fatal to it.

A high tolerance for ambiguity is a key requisite to the shared decision making which ultimately is the key to successful operation of a Management Team. Cut and dried, unilateral decisions are few, though not non-existent. Decentralizing the decision making results in bringing many leadership styles, attitudes and motivations into play in the solution of problems. A decision which is made by a team of staff members, following a process which allows for the exercise

of individual thought and action, means additional time and corporate energies are expended. It means that some members of the Management Team will be approaching the problem with less background knowledge about and personal interest in its solution than would have been brought to the problem by the superintendent or his deputy in a centralized system. It is this corporate diversity which, while it results in time consumption and ambiguity compared to a unilateral, top-level decision, contributes most to the quality of the problem solution and its support by members of the team.

THE MANAGEMENT TEAM PROCESS
WHAT IS IT ??
ONE MODEL

The following Management Team model is an operational one which has developed since 1976 and is in current use in the Rio Linda Union School District. It is presented only as a point of departure and with a caution: "Implementing this model without giving attention to internalizing the needs of your district, in terms of structure and process, may be hazardous to your health."

In 1976 a management retreat was held to clarify the new superintendent's points of view and to identify management concerns and issues, which can be briefly summarized as the following:

1. Defining the Management Team
2. Shared decision-making
3. Roles of individuals in Management
4. Development of an effective communication system.

A representative committee was appointed to develop an organizational structure and process that would allow the district administration to effectively function as a Management Team. The four major concerns listed above were verified, through discussion and review of the literature, as critical elements to be resolved if we were to have an effective operational Management Team.

The model which resulted has been refined through trial and error and has dramatically changed the way we function in discovering, exploring and solving problems, disseminating information, exchanging ideas, etc.

Several discreetly different areas exist to provide for the collective and individual needs of members of the management staff.

The arena that now accommodates the total Management Team is the staff meeting, held twice monthly.

This meeting provides the setting for:

1. Presentation of concerns, questions and problems
2. Presentation of committee recommendations
3. Decision-making by consensus
4. Inservice training
5. Dissemination of information and sharing of ideas.

Due to the size of our Management Team, small groups were organized to further facilitate the process:

1. Area councils--composed of principals, coordinators, psychologists, vice-principals (organized into geographical units).
2. Cabinet--superintendent, deputy superintendent, directors, area council representatives (as needed) and classified management (as needed).
3. Sub Groups--funded programs curriculum personnel, special services personnel, and others as needed.

Small groups provide a setting for:

1. Discussing problems related specifically to the sub-group and making decisions.

2. Identifying problems, concerns and questions that relate to the total Management Team.

3. Developing solutions to problems, questions, concerns and sending representatives to a study committee.

4. Providing a setting for support of individuals.

5. Inservice.

The arena for analyzing problems is the study committee. A study committee is formed for each problem not resolved at staff meetings, due to its complexity. The study committee is composed of one representative from each area council and the cabinet.

The study committee's role is to make an in-depth investigation, explore alternatives and make a final recommendation to the total Management Team at the staff meeting.

The vehicle that permits the flow of information between management personnel, when problem solving, is the model outlined below. This model utilizes the contributions of the individual members of the

Management Team while working on the central issues that affect the aims or goals of the school district.

The decision making model assumes that individual managers will continue to have the responsibility to make decisions at their level and encourages them to get reactions and information from departments or individuals affected by the decision.

When a problem arises that affects the district, it is presented to the Management Team at a staff meeting. The staff accepts or rejects the problem and establishes a priority and time line. The problem (decision making model, example #1) may be of such a nature that it can be reviewed and a solution developed within the staff meeting.

Example:

Problem Statement - Each of the schools was faced with the necessity of administering the C.T.B.S. tests twice each year.

Factors: 1. The post test data received in June needed to be received earlier for program planning.

2. Use of growth comparison on pre and post testing was questionable.

3. Time, expense and energy excessive.

Solution: Staff consensus that February to February testing would meet the school district and state needs.

Action Taken: Director of Curriculum implemented the steps for the solution to come about.

Results: Schools within our district have been granted a state waiver and now have a February annual testing schedule.

Other problems (decision making model, example #2) require additional discussion and study and are accepted by the staff and thoroughly reviewed in small group meetings. Each small group selects a representative to present their views and a study committee is formed for that specific problem. The study committee analyzes this problem and develops a solution that is presented to the staff. After a solution is accepted, the committee is disbanded.

Example:

I. Concise Statement of Problem

Current practice of assignment and utilization of resource personnel other than FUNDED POSITION at individual schools (resource teachers, counselors, nurse, music, librarian) has resulted in unequal staffing patterns.

II. Factors that need to be considered

A. District and school needs for special program or activities.

B. Commitment to specific projects.

C. Funding of position by ESEA, EDY, ECE and the effect on utilization of personnel.

D. Dual roles by one individual.

E. Comparability study.

F. Factors related to assignment such as school size, special programs, unique needs, past practice.

G. Total dollar resource available for personnel.

H. New programs or project and personnel needs.

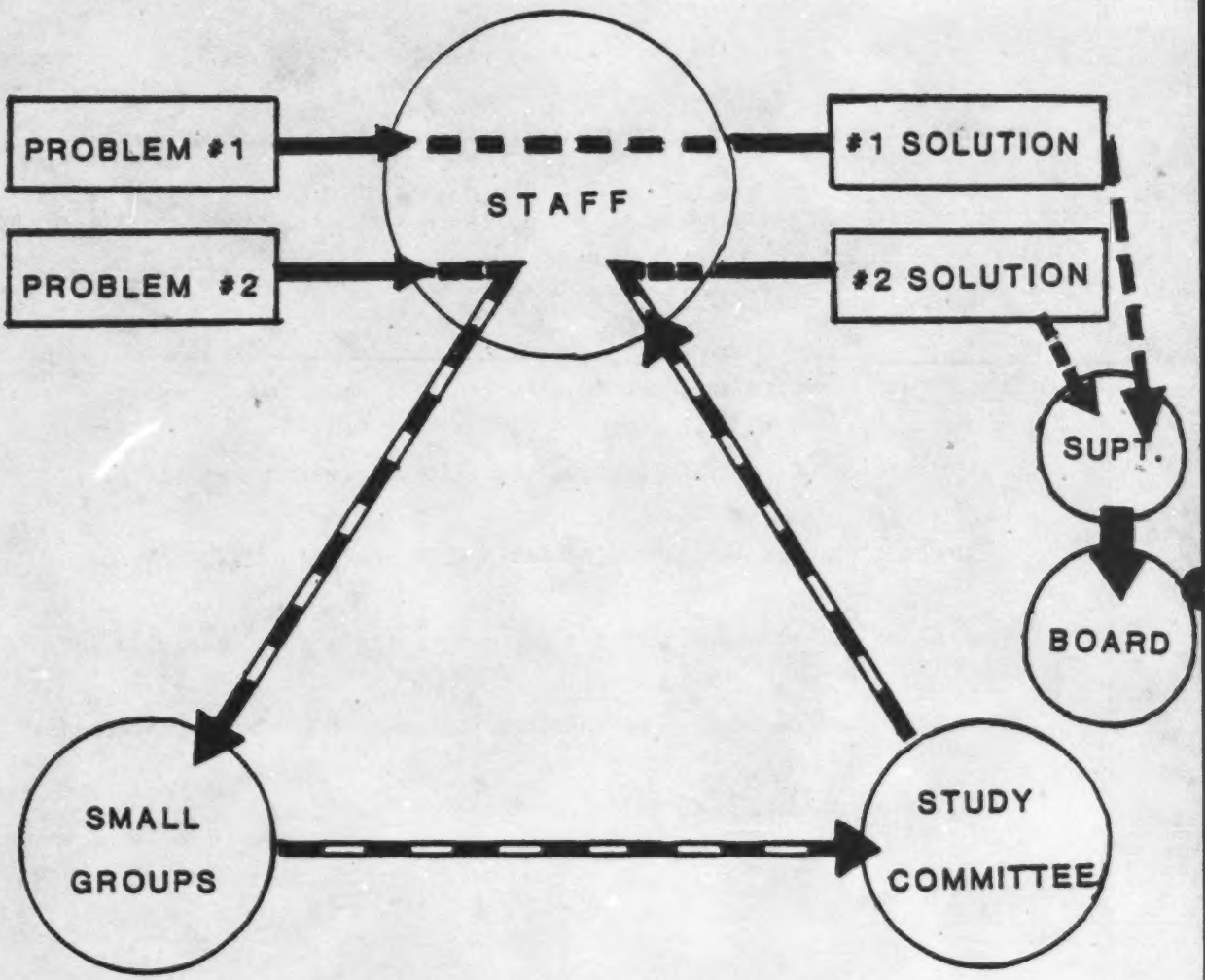
III. Individuals affected by solution

IV. All schools solution needed by January, 1978.

Solution: A system of assigning or re-assigning resource personnel which brings about a parity of resource services at each school and which assures comparability.

Action Taken: Problem assigned to area councils and cabinet, who provided input to a study committee. Study committee presented a "Utilization and Assignment of Personnel" plan to staff. The plan satisfied the solution criteria set previously and was accepted for future implementation. The solution is reviewed by the superintendent and, if necessary, will go to the Board of Trustees.

DECISION MAKING MODEL



SMALL GROUPS

Area Councils: Principals, Coordinator, Psychologist

Cabinet: Superintendent, Deputy Superintendent, Directors

STUDY COMMITTEES

Include one representative from each small group, above

33

A LITTLE
LEVITY
(HEH, HEH)

MANAGEMENT MANIA

"And we're going to have a management team based on mutual trust, shared decision making and total input. Take it or leave it!"

"WE'RE GOING TO WORK ON THIS STUDY UNTIL 10:00, THEN TAKE A..
FIVE MINUTE BREAK, NO MORE. AFTER WHICH WE'LL GO INTO THE ANNUAL REPORT TIL NOON.
THEN IT'S LUNCH AT CLAYBOURNE'S, 45 MINUTES, NO COCKTAILS.
WELL WORK THROUGH UNTIL 5:00, THEN WELL DECIDE.... WANNA QUIT AT $90 OR $95?
"BOY, THIS DECISION MAKING IS HEADY STUFF."
DLW

"That was the worst staff meeting I've ever been to. Nothing but talk, talk, talk!"

MANAGEMENT MANIA

"Do you want this filed under 'Title IX' or under 'Stuff it!'?"

"Bring me the Farris grievance file, the callback number of the ACLU attorney, the minutes of the latest negotiating session, four aspirin and my mommy."

FOR THE LAST TIME FLACK, STOP REFERRING TO THE MANAGEMENT TEAM AS A CONFLICT IN TERMS. WE'RE NOT PLAYING BASEBALL, DAMMIT!

WORKSHOP QUESTIONNAIRE

I. During the workshop generalizations have been made about the elements needed for a successful district management operations.

On the left, mark "yes" or "no" to indicate your agreement as to the necessity of these elements in a management operation.

On the right, rate your district's present practice with regard to these elements, 1 to 5; 1 being low, 5 being high.

Yes	No		Low High
___	___	1. An organizational structure and process has been established to facilitate involvement, communication and decision-making among management personnel.	1 2 3 4 5
___	___	2. The management team members avail themselves of the process.	1 2 3 4 5
___	___	3. I feel that communication among group members is open and easy and based on confidence and trust.	1 2 3 4 5
___	___	4. Management personnel are encouraged to identify concerns, problems, etc., and deal with them in a constructive manner.	1 2 3 4 5
___	___	5. Either before or during a management meeting, members can get items on the agenda.	1 2 3 4 5
___	___	6. Management team members have ample opportunity for input on decisions which affect them.	1 2 3 4 5
___	___	7. I feel that generally, decisions are made at the appropriate level.	1 2 3 4 5
___	___	8. My input is given appropriate consideration along with input from other members of the management team.	1 2 3 4 5
___	___	9. Decisions made at my level are supported by various levels of management personnel	1 2 3 4 5
___	___	10. The attitudes and behavior of management personnel are supportive of each other.	1 2 3 4 5

II. Please rate the following on a 1 to 5 scale:	Low				High
1. How effective is your total management team in being supportive of each member, identifying problems, communicating, and its general overall operation?	1	2	3	4	5
2. To what degree do you feel the management team concept is understood?	1	2	3	4	5
3. To what degree do you feel that a management team process is desirable?	1	2	3	4	5
4. To what degree does your district now have a management team process?	1	2	3	4	5
5. To what degree do you feel further evaluation of your district's management operation is needed?	1	2	3	4	5
6. To what degree would you be committed to working with and/or further developing a management team process?	1	2	3	4	5

Please check:

Board Member ☐

Superintendent ☐

Director ☐

Principal ☐

Coordinator, Supervisor, Dept. Head ☐

Psychologist ☐

WORKSHOP QUESTIONNAIRE RESULTS

Part I

Board Members	Superintendents	Directors	Principals	Coordinators, etc.	Psychologists	Yes	No

1. An organizational structure and process has been established to facilitate involvement, communication and decision-making among management personnel.
2. The management team members avail themselves of the process.
3. I feel that communication among group members is open and easy and based on confidence and trust.
4. Management personnel are encouraged to identify concerns, problems, etc., and deal with them in a constructive manner.
5. Either before or during a management meeting, members can get items on the agenda.
6. Management team members have ample opportunity for input on decisions which affect them.
7. I feel that generally, decisions are made at the appropriate level.
8. My input is given appropriate consideration along with input from other members of the management team.
9. Decisions made at my level are supported by various levels of management personnel.
10. The attitudes and behavior of management personnel are supportive of each other.

Low 1	2	3	4	High 5	Board Members	Superintendents	Directors	Principals	Coordinators, etc.	Psychologists

Part II

1. How effective is your total management team in being supportive of each member, identifying problems, communicating, and its general overall pattern?
2. To what degree do you feel the management team concept is understood?
3. To what degree do you feel that a management team process is desirable?
4. To what degree does your district now have a management team process?
5. To what degree do you feel further evaluation of your district's management operation is needed?
6. To what degree would you be committed to working with and/or further developing a management team process?